

# A Beginner's Guide to Using Portfolio Manager for Benchmarking Law Compliance



ENERGY STAR®  
Portfolio Manager®

# “Basics of Building Benchmarking for Ordinance Compliance” Webinar Series

- **Part 1** (January 25)

*A Beginner's Guide to Using Portfolio Manager for Benchmarking Law Compliance*

- **Part 2** (February 10)

*Using Benchmarking Results to Understand your Building's Performance*

- **Part 3** (March 10)

*To Efficiency and Beyond! How to Benefit from Benchmarking Compliance with Strategies for Improving your Energy Performance*

[https://www.energystar.gov/buildings/training/complying\\_ordinances](https://www.energystar.gov/buildings/training/complying_ordinances)

# Learning Objectives

- Understanding the role of EPA's Portfolio Manager tool in benchmarking law compliance
- Getting started using Portfolio Manager
- Successfully submitting building data to your local jurisdiction

Note: ENERGY STAR also has short, 5-minute videos on introductory topics related to Portfolio Manager available at [www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training)

# Learning Objectives

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# What is a Benchmarking Law?



Interactive Map Available at: <https://www.energystar.gov/buildings/program-administrators/state-and-local-governments/see-federal-state-and-local-benchmarking-policies>

Find another benchmarking ordinance map at: <https://www.imt.org/resources/map-u-s-building-benchmarking-policies/>

# EPA vs. Jurisdiction Responsibilities

**The EPA and ENERGY STAR can answer questions about...**

- How to use Portfolio Manager
- Portfolio Manager metrics such as the ENERGY STAR score
- Portfolio Manager alerts and data quality checks
- How to connect with other Portfolio Manager users including utilities and 3<sup>rd</sup> party service providers



**Your state or local jurisdiction can answer questions about...**

- Which buildings are subject to the benchmarking law
- Which data and time periods are required for reporting
- Due dates for submission and fines
- Confirmation that your report was received and/or complete



# Portfolio Manager and Benchmarking Laws in Canada

Please direct all questions about Canadian benchmarking laws to  
Natural Resources Canada:

- **Toll free:** 1-877-360-5500
- **Ottawa local:** 613-992-3245
- **Email:** [info.services@nrcan-rncan.gc.ca](mailto:info.services@nrcan-rncan.gc.ca)
- **Website:** <https://www.nrcan.gc.ca/energy-efficiency/energy-star-canada/18953>



Natural Resources  
Canada

Ressources naturelles  
Canada

Canada



# Online List of Service Providers

## Most Active Service & Product Providers

ENERGY STAR Service and Product Providers (SPPs) have demonstrated their expertise and achievements by meeting strict ENERGY STAR program requirements for benchmarking customer buildings using Portfolio Manager and gaining ENERGY STAR certification for buildings. Use this directory to find SPPs that have done the most for their clients through ENERGY STAR in the past 12 months.

1 - 290 of 290 Show: 25 | 50 | 100 | All

1

Company Name EXIT	Company Type	Contact	Benchmark ?	ENERGY STAR Certifications ?
ENGIE Impact	Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management	Paige Janson 800-767-4197 (phone) info@engieimpact.com	51319	250
Schneider Electric	Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management	Erik Mohn 502-614-2348 (phone) erik.mohn@se.com	43915	416
WegoWise	Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management	Dan Teague 617-367-9346 (phone) dteague@wegowise.com	18658	55
Bright Power, Inc.	Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management	Jeffrey Perlman 212-803-5868 (phone) jperlman@brightpower.com	18374	146
Measurabl, Inc.	Energy Information and Data Management	Measurabl Team 619-719-1716 (phone) info@measurabl.com	17641	1287
Willdan Group, Inc.	Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management	Jason Steinbock 515.271.9908 (phone) jsteinbock@willdan.com	15698	0

View the list online here: [https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/most\\_active](https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/most_active)



# Learning Objectives

- Understanding the role of EPA's Portfolio Manager tool in benchmarking law compliance
- **Getting started using Portfolio Manager**
- Successfully submitting building data to your local jurisdiction

# To get started benchmarking in Portfolio Manager you will need...

- 1 Property information:
  - Primary function
  - Name, address, zip/postal code
  - Year built
  - Gross floor area
- 2 Property use details, e.g.:
  - Operating hours
  - No. of computers
  - No. of workers, etc.
- 3 Consumption data for all resources that you need to report for the duration of the compliance period

Use Portfolio Manager's **[data collection worksheet](#)** to gather data upfront for your property type/s

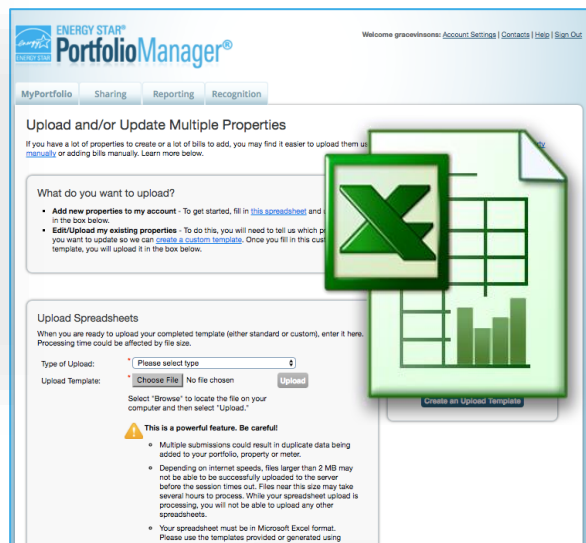
<https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet>

# Get Data Into Portfolio Manager

## Manual entry



## Spreadsheet upload



## Automated data uploads



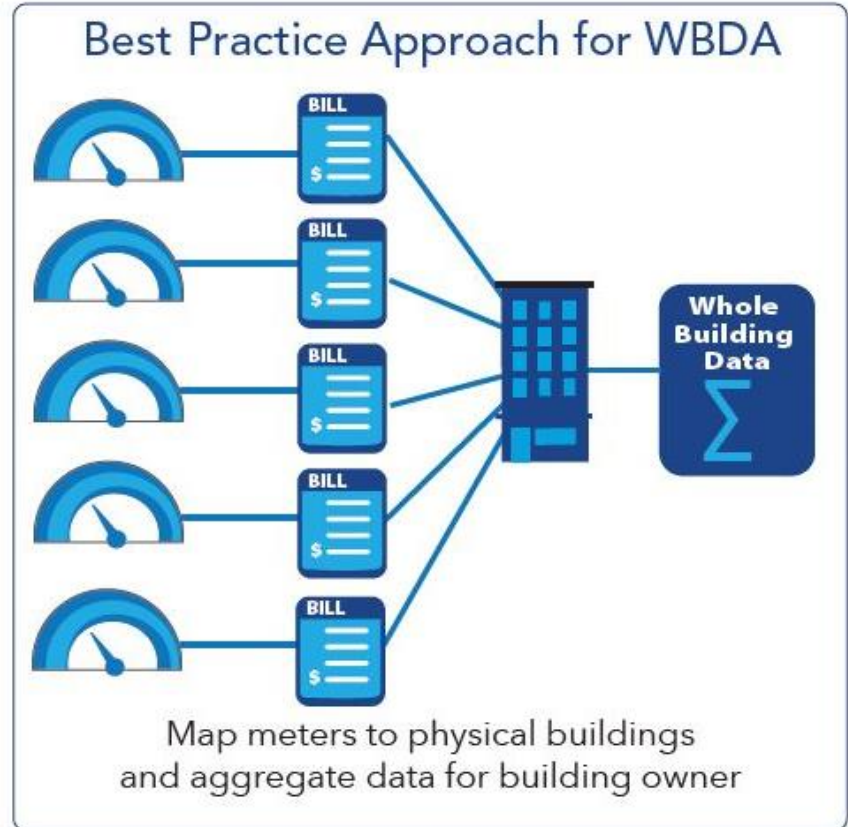
**Choose the best data management method.**

**More on how to get utility data into Portfolio Manager:**

**<https://www.energystar.gov/buildings/tools-and-resources/how-get-data-portfolio-manager>**

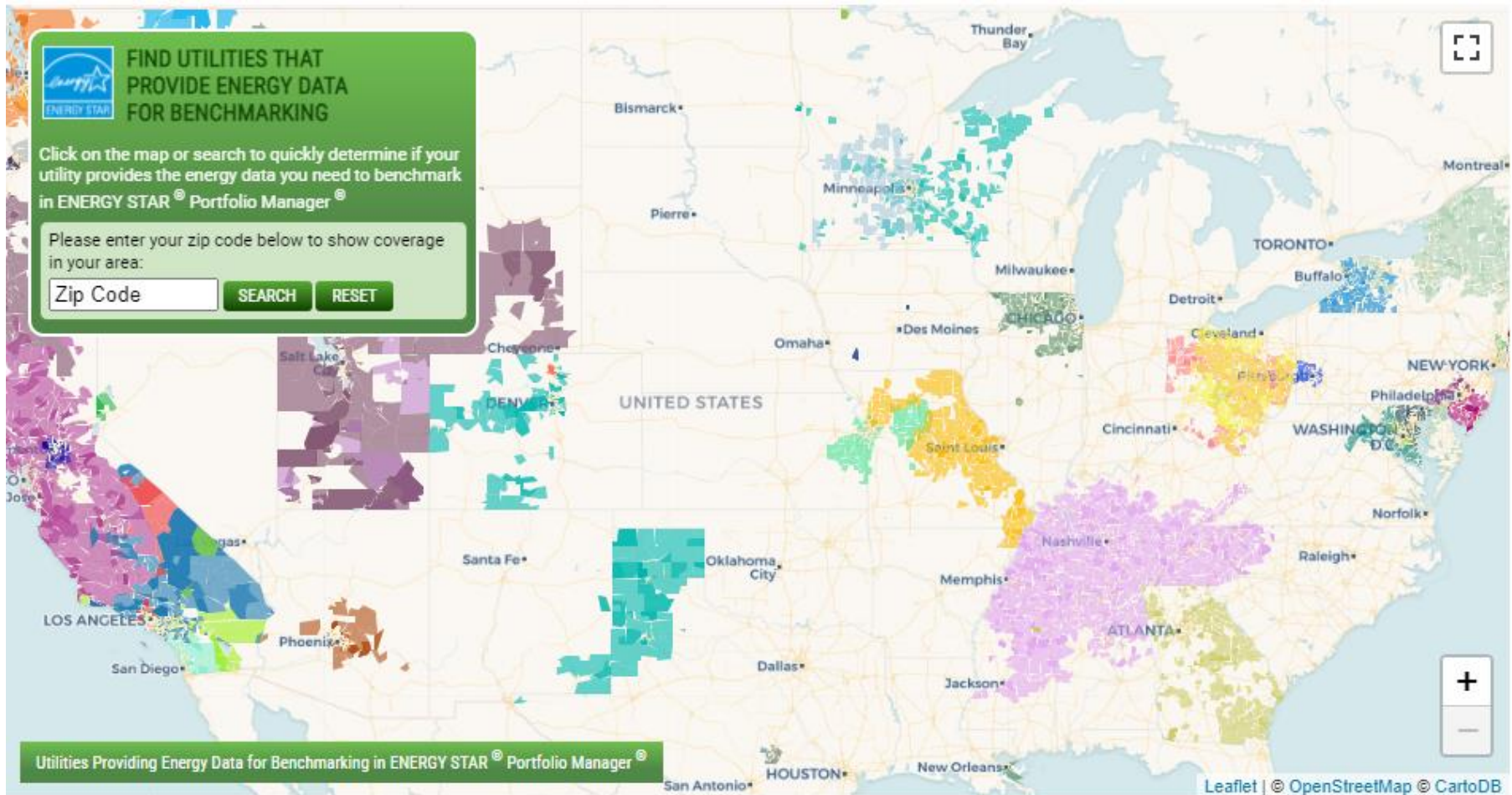
# Utility Data Access and the Benefits of Aggregate Data

- Without complete, whole-building consumption data (all fuels, all meters), benchmarking results will not be accurate.
- Obtaining complete consumption data can be difficult for some multi-tenant/multi-family scenarios.
- Many utilities can provide aggregate whole-building consumption data (i.e., a single consumption value for each fuel for each month).



*Credit: US Department of Energy*

# Utility Data Access Map



Website: <https://www.energystar.gov/utilitydata>



ENERGY STAR®  
PortfolioManager®

The simple choice for energy efficiency.

ENERGY EFFICIENT products | ENERGY SAVINGS at home | ENERGY EFFICIENT new homes | ENERGY STRATEGIES FOR buildings & plants

Home » Buildings & Plants » Owners and managers » Existing buildings » Use Portfolio Manager

Buildings & Plants

about us | press room | help desk | portfolio manager login

Owners and managers | Service providers | Program administrators | Tenants | Tools and Resources | Training

Existing buildings

Learn the benefits

Get started

Use Portfolio Manager

How Portfolio Manager helps you save

The benchmarking starter kit

Identify your property type

Enter data into Portfolio Manager

The data quality checker

How Portfolio Manager calculates metrics

Interpret your results

Verify and document your savings

Share and request data

Updates to ENERGY STAR scores with CBECS data

Get help accessing your utility data

Track waste and materials

Save energy

Find financing

Earn recognition

Communicate your success

Resources for your property

Use Portfolio Manager

You've heard it before: you can't manage what you don't measure. That's why EPA created ENERGY STAR Portfolio Manager®, an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. Use it to benchmark the performance of one building or a whole portfolio of buildings, all in a secure online environment.

Not sure if Portfolio Manager is for you? It is!

You can use Portfolio Manager to manage the energy and water use of any building. Seriously. Any building. K-12 school? Check. Office building? Check. Stadium? Check. We could keep going. All you need are your energy bills and some basic information about your building to get started.

Are you designing a new commercial building? You can also use Portfolio Manager to set your energy use target and see how your estimated design energy stacks up against similar existing buildings nationwide.

2017 ENERGY STAR TOP CITIES

1. Washington, DC
2. Los Angeles
3. New York

SEE WHO ELSE MADE THE LIST!

ENERGY STAR® PortfolioManager®

EPA's online energy management and tracking tool enables you to measure and track the energy and water performance of any building over time.

Register now

Log in

username ekatezayko1

password [redacted]

Forgot password?

Forgot username?

LOGIN

PORTFOLIO MANAGER DATA COLLECTION WORKSHEET

Easily see what information is required for your property and create a PDF or Word worksheet to help collect the data.

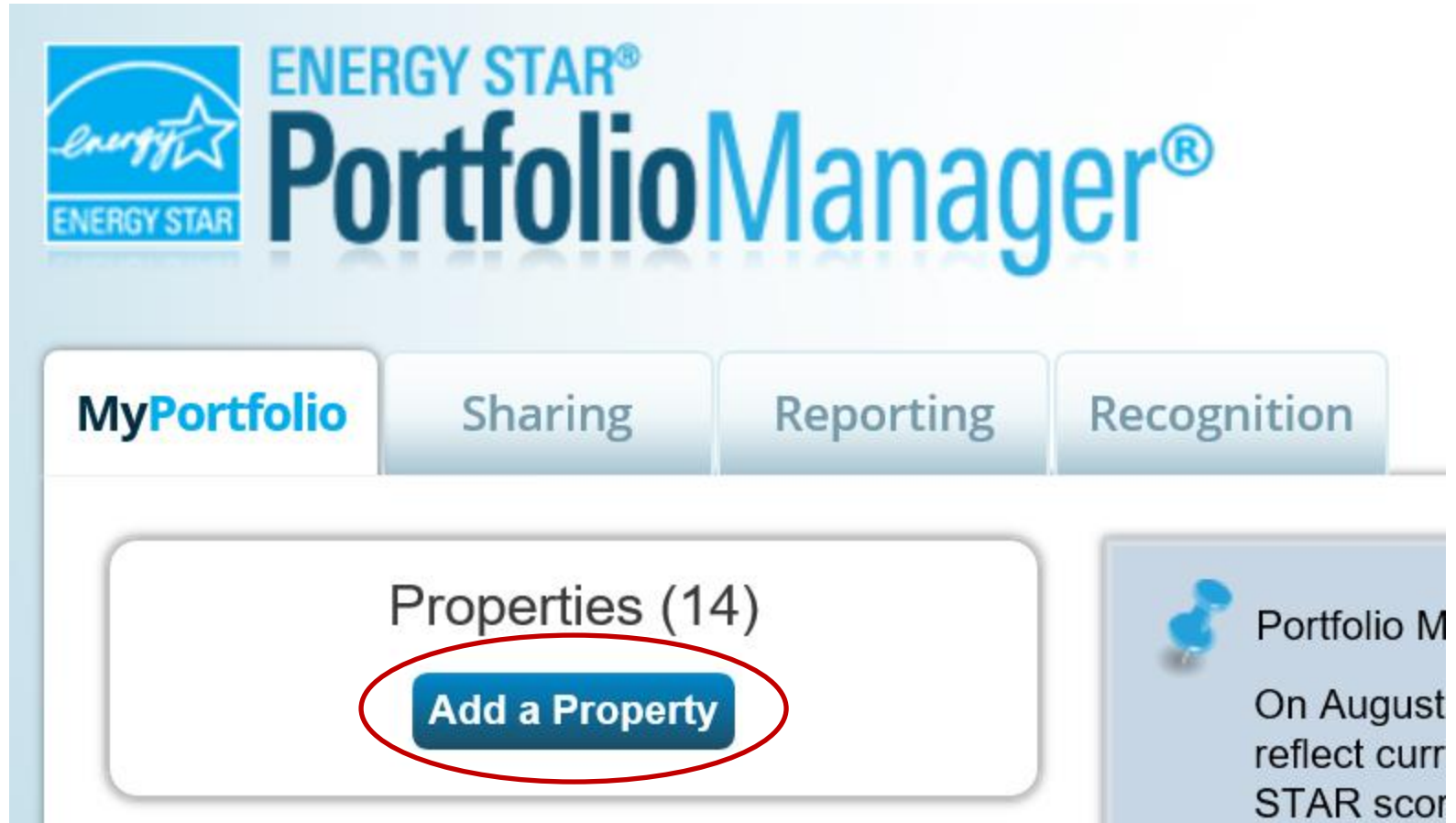
LEARN MORE

Join the rest of the industry

Select "Register Now"

Free, online secure platform: [www.energystar.gov/portfoliomanager](http://www.energystar.gov/portfoliomanager)

## Add a Property



The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top, the logo features a blue square with a white star and the word 'energy' in a script font, with 'ENERGY STAR' in a blue box below it. To the right, the text 'ENERGY STAR®' is in blue, followed by 'PortfolioManager®' in a large, bold, blue font. Below the logo, there are four tabs: 'MyPortfolio' (highlighted in white), 'Sharing', 'Reporting', and 'Recognition' (all in blue). Under the 'MyPortfolio' tab, there is a white box with the text 'Properties (14)' and a blue button with the text 'Add a Property' circled in red. To the right of this box is a blue box with a pushpin icon and the text 'Portfolio M' and 'On August reflect curr STAR scor'.




# Add a Property: Existing Property

Select  
Property  
Type

Select  
number of  
buildings


Select  
construction  
status

 **ENERGY STAR®**  
**PortfolioManager®**

Welcome ekatezayko1: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

### Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!




#### Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

[Learn more about Property Types.](#)




#### Your Property's Buildings

How many physical buildings do you consider part of your property?

- ☐ **None:** My property is part of a building
- ☐ **One:** My property is a single building
- ☐ **More than One:** My property includes multiple buildings ([Campus Guidance](#))

How many?




#### Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?


- ☒ **Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
- ☐ **Design Project:** My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
- ☐ **Test Property:** This is not a real property. I am entering it to test features, or for other purposes such as training.

**Get Started!**


[Cancel](#)

 **Tip**

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).


 **Tip**

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

 **Test Properties**

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

# Basic Property Information

 **ENERGY STAR®**  
**PortfolioManager®**

Welcome ekatezayl

## Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

### About Your Property

Name:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

[Year Built:](#)

Gross Floor Area:   ☐ [Temporary Value](#)

**Gross Floor Area (GFA)** is the total property floor area, measured from the principal exterior surfaces of the building(s). **Do not include parking.** [Details on what to include.](#)

[Irrigated Area:](#)   %

[Occupancy:](#)  %

# Basic Property Information

## Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID(s):

▼

ID:

 [Add Another](#)

Select from  
drop-down  
and enter  
value  
manually

## Do any of these apply?

- ☐ My property's energy consumption includes [parking](#) areas
- ☐ My property has a [Data Center](#) that requires a constant power load of 75 kW or more
- ☐ My property has one or more retail stores
- ☐ My property has one or more restaurants/cafeterias

Answering these simple questions will help us guide you in entering your property correctly.



Back

Continue

[Cancel](#)

Need help figuring out your standard ID? Click here: <https://sforce.co/3a2Fjxh>

# Enter Values for Property Use Details

Add Another Type of Use

▼ **Building Use** / [Edit Name](#)

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 100,000 <input type="text"/> Sq. Ft. <input type="button" value="v"/>	1/1/1990 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1990 <input type="button" value="calendar"/>	<input type="checkbox"/>

▼ **Building Use** / [Edit Name](#)

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 12,000 <input type="text"/> Sq. Ft. <input type="button" value="v"/>	1/1/1992 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="button" value="calendar"/>	<input type="checkbox"/>


# Property Summary Tab

**MyPortfolio** | [Sharing](#) | [Reporting](#) | [Recognition](#) | [Admin](#) | [Processing](#)

Congratulations! You have successfully created your property.

Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.




## ENERGY STAR Elementary

123 Main Street, Washington, DC 20001 | [Map It](#)

Portfolio Manager Property ID: 14253785

Year Built: 1900

[Edit](#)



Not currently eligible for  
**ENERGY STAR**  
Certification

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) <small>Why not score?</small>	
Current:	<a href="#">N/A</a>
Baseline:	<a href="#">N/A</a>

[Summary](#) | [Details](#) | [Energy](#) | [Water](#) | [Waste & Materials](#) | [Goals](#) | [Design](#)


# Manual Data Entry – Energy Meters

**MyPortfolio** | [Sharing](#) | [Reporting](#) | [Recognition](#) | [Admin](#) | [Processing](#)

Congratulations! You have successfully created your property.

Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.




## ENERGY STAR Elementary

123 Main Street, Washington, DC 20001 | [Map It](#)

Portfolio Manager Property ID: 14253785

Year Built: 1900

[Edit](#)



Not currently eligible for  
**ENERGY STAR**  
Certification

[Change Metric](#)  
**Weather Normalized  
Source EUI (kBtu/ft²)** Why not score?  
**Current:** [N/A](#)  
**Baseline:** [N/A](#)

[Summary](#) | [Details](#) | [Energy](#) | [Water](#) | [Waste & Materials](#) | [Goals](#) | [Design](#)

# Enter Additional Information

## Get Started Setting Up Meters for Supermarket A-1

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.



### Sources of Your Property's Energy

What kind of [energy](#) do you want to track? Please select all that apply.

- ☐ Electric
- ☐ Natural Gas
- ☐ Propane
- ☐ Fuel Oil (No. 2)
- ☐ Diesel
- ☐ District Steam
- ☐ District Hot Water
- ☐ District Chilled Water
- ☐ Fuel Oil (No. 4)
- ☐ Fuel Oil (No. 5 and No. 6)
- ☐ Coal (anthracite)
- ☐ Coal (bituminous)
- ☐ Coke
- ☐ Wood
- ☐ Kerosene
- ☐ Fuel Oil (No. 1)
- ☐ Other:



### Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.



### Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)



### Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn more.](#)

**Get Started!**

[Cancel](#)



# About Your Meters

## About Your Meters for Supermarket A-1

Enter the information below about your new meters. The meter's **Units** and **Date Meter became Active** are required. You can also change the meter's name.

### 2 Energy Meters for Supermarket A-1 (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	C
<input type="checkbox"/>	Natural Gas	Natural Gas				<input checked="" type="checkbox"/>		<input type="checkbox"/>	1
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>	

- ccf (hundred cubic feet)
- cf (cubic feet)
- Cubic meters
- GJ
- kBtu (thousand Btu)
- kcf (thousand cubic feet)
- MBtu/MMBtu (million Btu)
- MCF (million cubic feet)
- therms

[Delete Selected Entries](#)

[Add Another Entry](#)

Back

Create Meters

[Cancel](#)

Follow Us    

[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

# Add Energy Consumption Information

Expand  
meter by  
clicking  
arrow

The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top, the logo and 'Welcome Kaye Lynch-Sparks: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)' are visible. A green message box states: 'Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.'

### Your Meter Entries for Supermarket A-1

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

**3 Energy Meter(s) for Supermarket A-1**

- ▶ Natural Gas [Edit](#)
- ▶ Fuel Oil (No. 2) [Edit](#)
- ▶ Electric Grid Meter [Edit](#)

At the bottom of the list are 'Back' and 'Continue' buttons, with a 'Cancel' link next to 'Continue'. The footer includes 'Follow Us' with social media icons and links for 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

# Add Meter Entries and Fill in Data

## How To Guide: Electric Demand Tracking

[https://www.energystar.gov/buildings/tools-and-resources/how\\_track\\_electric\\_demand\\_portfolio\\_manager](https://www.energystar.gov/buildings/tools-and-resources/how_track_electric_demand_portfolio_manager)

Add  
another  
entry

Basic Meter Information

Monthly Entries

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

[Delete Selected Entries](#)  
[Add Another Entry](#)  
[Learn how to copy/paste](#)

Upload data in bulk for this meter:

You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

[Cancel](#)

Use a  
spreadsheet  
to upload or  
copy and  
paste

## Meters to Add to Total Consumption

**MyPortfolio**   Sharing   Reporting   Recognition

---

Your meter entries have been added to your meters!

## Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [Supermarket A-1](#) so that we can provide you with the most accurate metrics possible.

### Summary

3

Please tell us what your meters represent.

### Energy Meters

Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they are [sub-meters](#).)

	Name Meter ID	Type
<input checked="" type="checkbox"/>	<a href="#">Fuel Oil (No. 2)</a> 30521002	Fuel Oil (No. 2)
<input checked="" type="checkbox"/>	<a href="#">Natural Gas</a> 30521001	Natural Gas
<input checked="" type="checkbox"/>	<a href="#">Electric Grid Meter</a> 30521003	Electric - Grid

**Total of 3 meter(s).** Tell us what this represents:

- \* ☐ These meter(s) account for the total energy consumption for [Supermarket A-1](#) (a single building).
- ☐ These meter(s) do not account for the total energy consumption for [Supermarket A-1](#) (a single building).

**About Sub-meters**

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity).  
[Learn More about configuring meters for performance metrics.](#)

Apply Selections
Cancel

# Energy Meters Tab: Meters Added and Displayed

**MyPortfolio** | [Sharing](#) | [Reporting](#) | [Recognition](#)

**Notification**

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

**Supermarket A-1**

1214 Main Street, Arlington, VA 22201 | [Map It](#)  
Portfolio Manager Property ID: 6836065  
Year Built: 1992 | [Edit](#)

[Change Metric](#)

**Weather Normalized Source EUI (kBtu/ft<sup>2</sup>)** Why not score?

**Current:** [N/A](#)

**Baseline:** [N/A](#)

[Summary](#) | [Details](#) | **[Energy](#)** | [Water](#) | [Waste & Materials](#) | [Goals](#) | [Design](#)

**Meter Summary**

5 Energy Meters Total

- 3 - Used to Compute Metrics
- 2 - Not Used in Metrics

[Add A Meter](#)

Current Energy Date Not Available

[Enter Your Bills](#)

**Meters - Used to Compute Metrics (3)**

[Change Meter Selections](#)

[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
<a href="#">Electric Grid Meter</a> 56291144	Electric - Grid		Yes
<a href="#">Fuel Oil (No. 2)</a> 56291143	Fuel Oil (No. 2)		Yes
<a href="#">Natural Gas</a> 56291142	Natural Gas		Yes

[Download Annual Totals by Meter](#)

**Four Ways to Enter Bill Data**

# View Meter Data and Manage Bills for Your Property

Monthly Entries

Display Year(s): 

Show All Years x

	Start Date	End Date	Usage kWh (thousand Watt- hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Upd
<input type="checkbox"/>	1/1/2019	2/1/2019	532,173	39,900.00	<input type="checkbox"/>	<input type="checkbox"/>	1,293	13,304.00	
<input type="checkbox"/>	2/1/2019	3/1/2019	518,833	37,500.00	<input type="checkbox"/>	<input type="checkbox"/>	1,261	12,970.00	
<input type="checkbox"/>	3/1/2019	4/1/2019	516,496	37,245.00	<input type="checkbox"/>	<input type="checkbox"/>	1,255	12,912.00	
<input type="checkbox"/>	4/1/2019	5/1/2019	500,123	35,689.00	<input type="checkbox"/>	<input type="checkbox"/>	1,214	12,503.00	

Delete Selected Entries

Add Another Entry

Learn how to copy/paste

Delete All Entries

Upload data in bulk for this meter:

You can use the single-meter spreadsheet to either: "Upload" the file below, or copy and paste the data from the spreadsheet into the table above ([instructions in this FAQ](#)). Use this single-meter [spreadsheet template](#).

Browse...

Upload

Save Bills

Cancel

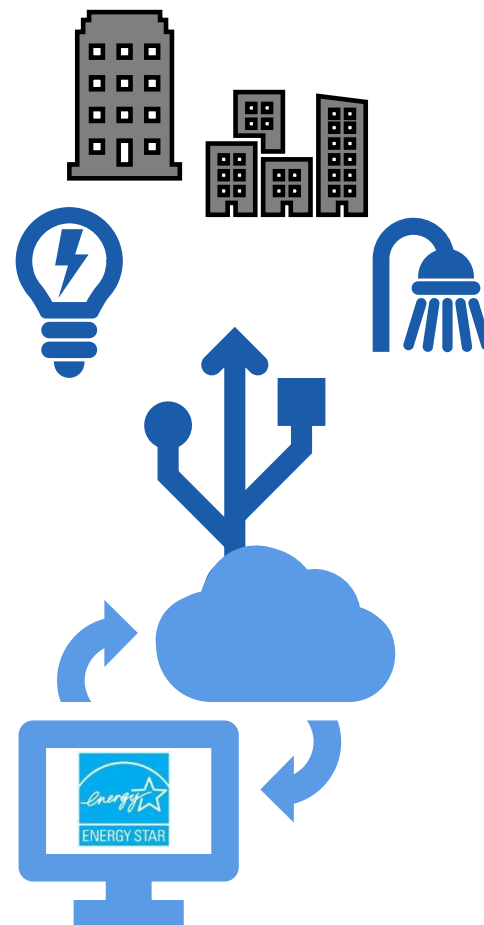
# Learning Objectives

- Understanding the role of EPA's Portfolio Manager tool in benchmarking ordinance compliance
- Getting started using Portfolio Manager
- Successfully submitting building data to your local jurisdiction

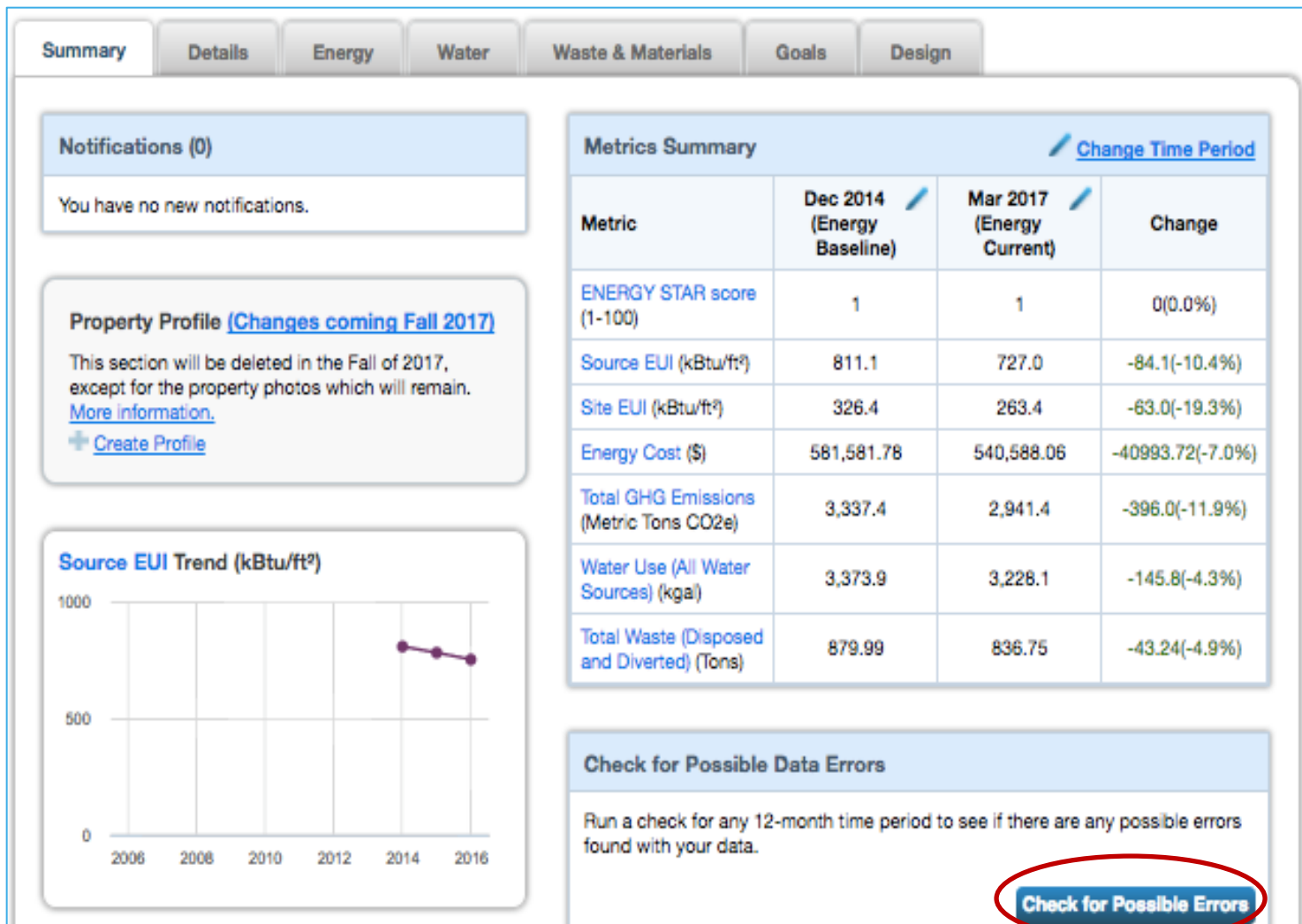


# Common Data Collection Methods

- Your local jurisdiction will likely collect the required data in one of two ways:
  1. **Property Share** - a property share requires you to share your property record and data with your jurisdiction's Portfolio Manager account directly
  2. **Data Request** - a Portfolio Manager Data Request that is accessed through a unique link and only requires you to share data for a specific time period



# Data Quality Checker



# Accessing a Data Request



## Atlanta Building Efficiency



ABOUT HOW TO COMPLY ▼ RESOURCE CENTER ▼ DEADLINES RESULTS

Use the links below to submit your energy & water data:

Send 2020 Benchmarking Data for 2021 Compliance



### About this Data Request

**Data Requested By:** City of Atlanta

**Instructions:** This reporting template must be used for compliance with the City of Atlanta's benchmarking requirements in accordance with Section 8-2222 of the Land Development Code, Part III of the Atlanta City Code.

The deadline for meeting the 2021 compliance requirement is June 1, 2021, covering the calendar year 2020. For detailed instructions on how to comply with Atlanta's benchmarking ordinance and for the most up-to-date information including deadlines, visit [www.atlantabuildingefficiency.com](http://www.atlantabuildingefficiency.com).

**Make sure to include your Atlanta Building ID in your submission** | To add, go to your property's profile, select the "details" tab at the top, find the "Unique Identifiers" box on the left-hand side, click "edit", scroll down to "Standard IDs", select "Atlanta Buildings ID", enter your Atlanta Buildings ID, and click "Save".

**For help, contact:** City of Atlanta at [buildingefficiency@atlantaga.gov](mailto:buildingefficiency@atlantaga.gov) or Unavailable

### Responding to Data Requests

You are viewing this screen because someone has asked you to provide data to them in the form of a data request. To respond, simply fill out the information on this screen and select what properties you wish to include (some decisions may have been made by the data requestor.)

Also see the [How to Respond to Data Requests](#) guide.

# Accessing a Data Request

## About Your Response

Who is this data being submitted on behalf of?

- ☒ myself  
☐ someone else

Select if you're submitting the request yourself, or on behalf of someone else



### Submitting Data for Someone Else

Sometimes people delegate their responsibilities for responding to data requests to other people. If you are responding on behalf of someone else, please select their name from your Contacts Book so that they will be attributed to the response.



### Previewing Reports

Making selections here will include specific properties and timeframes in your response. You may preview your response before you send it. However, Portfolio Manager will need to prepare the preview in order for you to view it. Large responses may take more time to prepare. Your response preview will be available from the "Templates & Reports" section on the Reporting tab when it is ready.

## Your Response

Select Information to Include:

Timeframe: \* Single Year ▼ Dec 31 ▼ 2019 ▼



If the data requestor has specified a timeframe for the request, you will not be able to change it.

Properties: \* - Select Number of Property(ies) - ▼



The data requestor may have asked for one or more [standard IDs](#) to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.

Select properties that are required to benchmark

Generate Response Preview

[Cancel](#)

# Preview Your Response

## Templates & Reports (3)

[Create a New Template](#)

Your new response preview(s) has been generated.

⬅	Name	⬅	Date	▼	Action
	Data Request: Test (Request from Jon Smith)		Response Preview Generated:	5/13/2013 5:43 PM	<div>I want to... I want to... Edit Properties and Timeframe Preview Response Download Preview in Excel Generate an Updated Response Send Response Delete Response</div>
	Sample EPA Report #2		No Spreadsheet Generated		
	Sample EPA Report #1		No Spreadsheet Generated		

# Preview Your Response

The screenshot displays the ENERGY STAR Portfolio Manager web application. At the top, the logo and navigation links are visible. The 'Reporting' tab is selected, leading to the 'View Report: Atlanta 2020 Transparency Report' page. A message explains that the report is generated from a selected template and includes information and metrics for the included properties. Below this, a tab labeled 'Information and Metrics' is active, showing a table with one record. The table columns include Property Id, Property Name, Year Ending, Atlanta Building ID, Address 1, Address 2, City, and Cour. The single record listed is for Property Id 13502081, Property Name ICF HQ - Building II, Year Ending 12/31/2019, Atlanta Building ID Not Available, Address 1 9309 Lee Hwy, Address 2 Not Available, City Fairfax, and Cour Not Av.

ENERGY STAR®  
PortfolioManager®

Welcome Account | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out  
CW\_Processor: Settings

MyPortfolio Sharing **Reporting** Recognition Admin Processing

## View Report: Atlanta 2020 Transparency Report

The following displays the data generated from your [report template](#). It includes the information and metrics that you selected for the properties you included. You may "Generate a New Report" to get updated information from the action menu for this report template.

Information and Metrics

Information and Metrics 1 records

Property Id	Property Name ↕	Year Ending	Atlanta Building ID	Address 1	Address 2	City	Cour
13502081	ICF HQ - Building II	12/31/2019	Not Available	9309 Lee Hwy	Not Available	Fairfax	Not Av



# Send the Response to Complete Compliance

## 1 Who (besides you) should we send a confirmation email to?

Select contacts from your contacts book:

Example1 (EXACCOUNT1)  
Example2 (EXACCOUNT2)  
Example3 (EXACCOUNT3)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection.

Optional- Additional Email Addresses:

Separate multiple emails by a comma or semicolon.

## 2 What format would you like your data in for the email attachment?

- ☒ Excel  
☐ XML

## 3 E-Sign your Data Response, then "Send Data"

☐ I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Rising Stars with Test Org.

Your username:

Your password:

E-Sign Response

Send Data



# Send the Response to Complete Compliance

## What Would You Like To Do?



### I Want to Review/Edit these Properties

You can review individual properties/meters by using the links in the table above or [download it to Excel](#) in order to begin troubleshooting these issues.



### I Thought I Fixed These Problems- I Want to [Generate an Updated Response](#)

If you have made changes to your data since your response was generated (05/08/2020 03:02 PM EDT), you will need to re-generate the report in order for these changes to be reflected.

[Generate Updated Response](#)



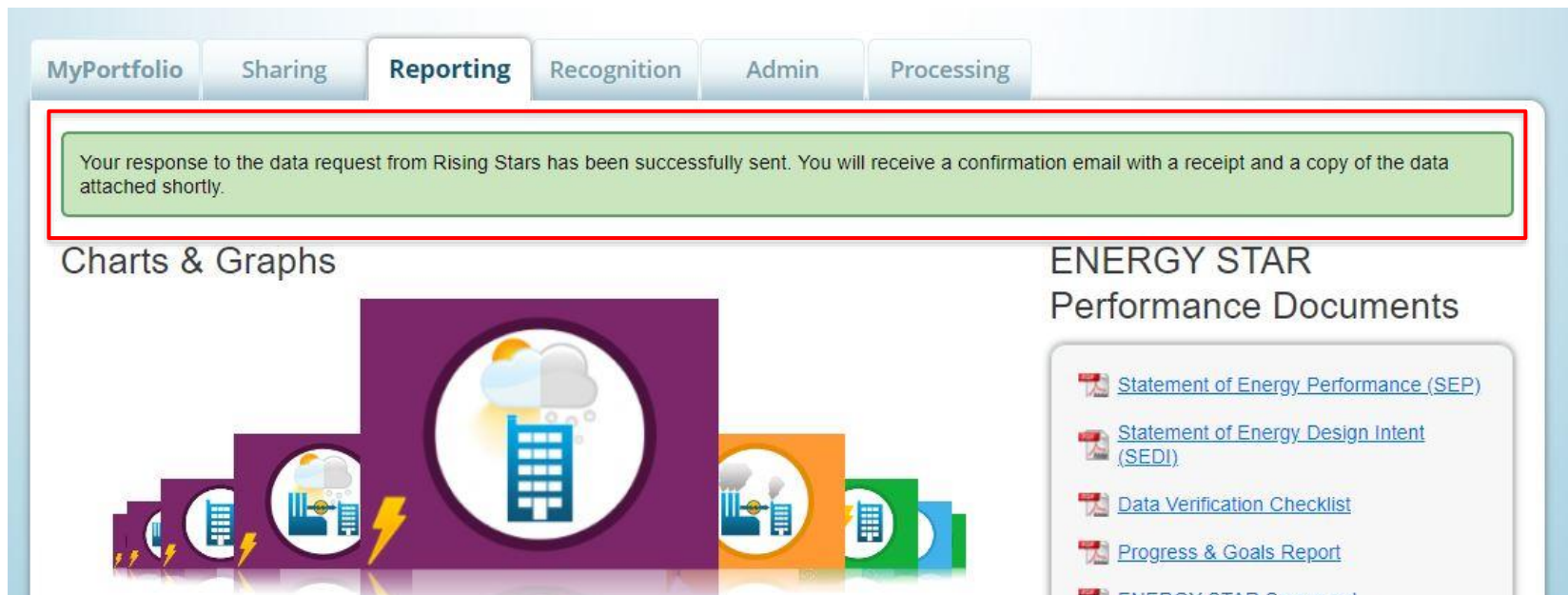
### I Want to Submit Anyway

If you have verified that any issues listed in the table above are not the result of a mistake, you can continue submitting your response. Note that an incomplete request could be considered invalid or non-compliant by the requestor so it is strongly encouraged that you fix any issue before proceeding.

[Send Response](#)

(You will confirm your response on the next screen)

# Send the Response to Complete Compliance



The screenshot displays the 'Reporting' tab of the ENERGY STAR interface. A green success message box at the top states: 'Your response to the data request from Rising Stars has been successfully sent. You will receive a confirmation email with a receipt and a copy of the data attached shortly.' Below this, the 'Charts & Graphs' section features a series of colorful icons representing energy efficiency metrics. The 'ENERGY STAR Performance Documents' section lists several downloadable documents: Statement of Energy Performance (SEP), Statement of Energy Design Intent (SEDI), Data Verification Checklist, Progress & Goals Report, and ENERGY STAR Scorecard.

MyPortfolio   Sharing   **Reporting**   Recognition   Admin   Processing

Your response to the data request from Rising Stars has been successfully sent. You will receive a confirmation email with a receipt and a copy of the data attached shortly.

Charts & Graphs

ENERGY STAR  
Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)

# Benchmarking Law Compliance Resources

- Contacts for state and local benchmarking ordinances:
  - <https://energystar-mesa.force.com/PortfolioManager/s/article/Contacts-for-state-local-compliance-ordinances-1600088543441>
- Utility data access map: <https://energystar.gov/utilitydata>
- List of services providers that perform Portfolio Manager benchmarking services:
  - [https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/most\\_active](https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/most_active)
- Finding your Standard ID:
  - <https://energystar-mesa.force.com/PortfolioManager/s/article/Standard-IDs-in-Portfolio-Manager-1600088552120>
- How to respond to Data Requests in Portfolio Manager:
  - <https://www.energystar.gov/buildings/tools-and-resources/how-respond-data-requests-portfolio-manager>
- How to share properties in Portfolio Manager:
  - <https://www.energystar.gov/buildings/tools-and-resources/how-share-data-other-users-portfolio-manager>

# Benchmarking Law Compliance FAQs



ABOUT FOR PARTNERS

SEARCH

Find Products

Save at Home

New Homes

Commercial Buildings

Indust

Search...

SEARCH

HOME

CONTACT US

HOME > PORTFOLIO MANAGER FAQs > FEDERAL, STATE & LOCAL REQUIREMENTS

## STATE & LOCAL BENCHMARKING REQUIREMENTS

ARTICLES

25

ARTICLES

**How do I find the receipt for the Data Request that I submitted?**

24 Views • Jan 12, 2021 • Knowledge

FAQs are available at [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp)



# “Basics of Building Benchmarking for Ordinance Compliance” Webinar Series

✓ **Part 1** (January 25)

*A Beginner’s Guide to Using Portfolio Manager for Benchmarking Law Compliance*

- **Register for Part 2** [here](#) (February 10)

*Using Benchmarking Results to Understand your Building’s Performance*

- **Register for Part 3** [here](#) (March 10)

*To Efficiency and Beyond! How to Benefit from Benchmarking Compliance with Strategies for Improving your Energy Performance*

[https://www.energystar.gov/buildings/training/complying\\_ordinances](https://www.energystar.gov/buildings/training/complying_ordinances)

# Extra Help

- Visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp)
  - Extensive list of FAQs
  - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at:  
[www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training)
  - Step-by-step documents (PDF)
  - Access to recorded trainings and short videos
  - Information on upcoming trainings
- Register for regular webinars at: <http://esbuildings.webex.com>
- Portfolio Manager Technical Reference Series:  
[http://www.energystar.gov/index.cfm?c=evaluate\\_performance.bus\\_portfoliomanager\\_model\\_tech\\_desc](http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc)

# Thank you for attending!

## Questions?

**Slides will be sent to all webinar registrants after today's session**

If you have any questions on Portfolio Manager  
or the ENERGY STAR program, contact us at:

[www.energystar.gov/BuildingsHelp](http://www.energystar.gov/BuildingsHelp)